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## FAO Forecasts World Meat Demand to Rise

Diets in developing countries are changing as incomes rise. The share of staples, such as cereals, roots and tubers, is declining, while that of meat, dairy products and oil crops is rising. Between 1964-66 and 1997-99, per capita meat consumption in developing countries rose by 150 percent, and that of milk and dairy products by 60 percent. By 2030, per capita consumption of livestock products could rise by a further 44 percent.

As in the past, poultry consumption will grow fastest. Productivity improvements are likely to be a major source of growth. This will allow increased production with lower growth in animal numbers, and a corresponding slowdown in the growth of environmental damage from grazing or wastes. In developing countries, demand will grow faster than production, producing a growing trade deficit. In meat products this will rise steeply, from 1.2 million tons a year in 1997-99 to 5.9 million tons in 2030 (despite growing meat exports from Latin America).

An increasing share of livestock production will probably come from industrial enterprises. In recent years production from this sector has grown twice as fast as that from more traditional mixed farming systems and more than six times faster than from grazing systems.

### Poultry Meat: Projections to 2010

World	Developing Countries	Developed Countries	Transitional Countries
Production (in million tons)			
**Period	64.2	33.0	28.3
2010	89.3	49.5	36.1
*92-99	5.4	8.3	3.6
*99-2010	3.1	3.8	2.2
Per Capita (in kg per person)			
**Period	10.6	7.2	29.0
2010	13.0	9.2	35.5
Imports (in thousand tons)			
**Period	6,823.1	3,636.5	1,306.8
2010	9,197.0	5,254.8	1,481.7
*92-99	15.9	14.5	8.6
*99-2010	2.8	3.4	1.1
Exports (in thousand tons)			
**Period	6,823.1	2,484.8	3,793.8
2010	9,199.3	3,837.0	4,747.6
*92-99	15.9	16.0	15.5
*99-2010	2.8	4.0	2.1

\*Growth Rates, Percent change per year

\*\*Period is 1998-2000 average

Source: Food and Agricultural Organization (FAO)

## Poland

Chicken meat imports increased 35 percent in 2001, mainly from the EU. As part of the Poland-EU pre-accession agreement, Poland approved a 21,000 ton duty-free import quota for poultry meat from the EU and, as a result, poultry imports from the U.S. fell more than 50 percent.

In 2001 rising U.S. turkey meat imports exceeded declining chicken meat imports. Imports of turkey meat from the U.S. increased by 130 percent in 2001. The increase reflected higher overall demand for frozen turkey for processing. Most turkey meat produced in Poland is processed and turkey is often used in place of pork in sausages.

It is expected that Poland will accede to the European Union in 2004 at which time U.S. poultry imports would be blocked. Poland is a major transshipment point for U.S. poultry meat shipments to Belarus, Ukraine and Moldova. Trade sources indicate that recent annual average transshipments range from 60,000 to 80,000 tons per year and are expected to retain this rate in 2002. Current indications are that Polish authorities may continue to permit transshipment of U.S. poultry meat to Eastern European markets following EU accession. U.S. poultry meat transshipments are already permitted by such current EU member states as Germany and Greece.

Source: USDA/Foreign Agricultural Service

### U.S. Egg Products Exports to Selected Countries (in mt)

	Jan-Jun			June		
	2001	2002	%	2001	2002	%
Canada	2,407.7	3,546.5	+47	451.4	644.7	+43
Japan	6,281.4	4,118.7	-34	968.2	1,495.4	+54
Belgium*	970.9	1,816.1	+87	148.5	421.1	+1.83
Mexico	804.8	719.7	-11	107.5	147.8	+37
World Total	13,250.4	12,289.5	-7	2,099.2	2,979.9	+42

\* Includes Luxembourg

Source: USDA/Department of Commerce

### January-May 2002 U.S. Poultry Exports

For the first five months of 2002, broiler exports totaled 1.9 billion pounds, down 18 percent from the same period in 2001 and turkey exports totaled 206 million pounds, up nearly 4 percent compared to the previous year.

The ban on poultry shipments to Russia pushed broiler exports down 31 percent and turkey exports down 56 percent. Broiler exports to China and Japan also fell while exports to Mexico grew 20 percent.

Broiler exports to Korea were 50 percent higher.

Turkey exports to Mexico rose 20 percent and totaled 100 million pounds. Exports to Hong Kong rose 131 percent to 33 million pounds, only 3 million pounds less than was shipped to Hong Kong in all of 2001.

Source: USDA/Economic Research Service

210 WALNUT STREET, ROOM 951, DES MOINES, IOWA, 50309 515/284-4471 FAX 515/284-4468

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**Inspected Egg Products-U.S. & Canada Export/Import Trade****U.S. Exports to Canada, in Pounds (000) (Preliminary)**

Week Ending August 24, 2002

Year-To-Date

Type	2002	2001 /1	2002	2001
Liquid	144	310	11,678	7,493
Frozen	0	0	21	78
Dried	18	0	386	40
Total	162	310	12,085	7,611

**U.S. Imports From Canada, in Pounds (000) (Preliminary)**

Week Ending August 24, 2002

Year-To-Date

Type	2002	2001 /1	2002	2001
Liquid	131	134	4,268	3,621
Frozen	39	90	2,816	937
Dried	0	26	3,358	401
Total	170	250	10,442	4,959

**Inspected Shell Eggs****U.S Exports To Canada, In 30-Dozen Cases (Preliminary)**

Week Ending August 24, 2002

Year-To-Date

	2002	2001 /1	2002	2001
Jumbo	33	0	1,193	87
Extra Large	750	1,854	37,988	39,361
Large	1,858	2,159	91,061	81,782
Medium	1,163	750	39,083	31,978
Ungraded	810	10,200	187,745	246,800
Misc	90	2,250	13,572	63,279
Total	4,704	17,213	370,642	463,287

/1 Comparable Week, to-date figures may not total due to rounding.

Source: USDA/AMS Poultry Programs, Market News Branch in cooperation with Agriculture Canada, Poultry Development Division.

**CENTRAL REGION MECHANICALLY SEPARATED CHICKEN**

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

30-AUG-2002				
<b>CHICKEN</b>	PRICES		VOLUME	
	(Cents per Pound)			

FAT	CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS					
RANGE		-	-	-	-
WTD AVERAGE					

**CHICKEN, WITH SKIN ADDED**

PRICES				
VOLUME				
(Cents per Pound)				

FAT	CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS					
RANGE	13.00-14.00	13.00-14.00		122,400	-
WTD AVERAGE	13.33	13.33			
15-20%					
RANGE	11.00-14.00	9.00-14.00		1,871,000	816,000
WTD AVERAGE	11.50	11.44			
20% OR MORE					
RANGE	-	-	-	-	-
WTD AVERAGE					

\* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

**LIVE POULTRY SLTRD UNDER INSPECTION** W/E 24-Aug-02  
(PRELIMINARY) **U.S. FOWL SLAUGHTERED DOMESTICALLY**

	LIGHT HENS	HEAVY HENS	TOTAL HENS
HEAD	1,764	1,650	3,414
LAST WEEK	1,764	1,523	3,287
SAME WEEK YR AGO	1,696	1,421	3,117
TO-DATE/2002	60,042	46,838	106,880
TO-DATE/2001	59,932	46,786	106,718

THOUSANDS

**U.S. FOWL SLAUGHTERED IN CANADA**

	LIGHT HENS	HEAVY HENS	TOTAL HENS
HEAD	203	4	207
LAST WEEK	302	4	306
SAME WEEK YR AGO	408	0	408
TO-DATE/2002	10,496	223	10,719
TO-DATE/2001	15,285	224	15,509

THOUSANDS

SOURCE: AGRICULTURE CANADA, PLTRY DEVELOPMENT DIV.

**TOTAL U.S. FOWL SLAUGHTERED IN THE U.S. AND CANADA**

	LIGHT HENS	HEAVY HENS	TOTAL HENS
HEAD	1,967	1,654	3,621
LAST WEEK	2,066	1,527	3,593
SAME WEEK YR AGO	2,104	1,421	3,525
TO-DATE/2002	70,538	47,061	117,599
TO-DATE/2001	75,217	47,010	122,227

THOUSANDS

SOURCE: USDA/AMS PLTRY PROGRAMS, MRKT NEWS BR.

**EASTERN REGION MECHANICALLY SEPARATED CHICKEN**

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

30-AUG-2002				
<b>CHICKEN</b>	PRICES		VOLUME	
	(Cents per Pound)			

FAT	CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS					
RANGE		-	-	-	-
WTD AVERAGE					

**CHICKEN, WITH SKIN ADDED**

PRICES				
VOLUME				
(Cents per Pound)				

FAT	CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS					
RANGE	14.50-17.00	13.50-17.00		1,140,000	120,000
WTD AVERAGE	16.43	15.91			
15-20%					
RANGE	12.00	10.00-16.00		650,000	40,000
WTD AVERAGE	12.00	13.89			
20% OR MORE					
RANGE	-	-	-	-	-
WTD AVERAGE					

\* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

**NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 30 AUGUST 2002.**

The undertone was firm on fresh tom breast meat and fresh destrapped tenderloins, fresh wing meat steady. The frozen white meat undertone was barely steady at best on wing meat, scapula steady to instances barely steady, breast trim steady, balance fully steady. Fresh white meat demand was good, best for prompt shipments for post holiday needs. Offerings limited. Frozen white meat inquiry was fair to good on tom breast meat and destrapped tenderloins, balance light. Offerings of frozen tom breast meat and destrapped tenderloins were held with confidence at mostly higher price levels, balance mixed. The undertone on 4-8 lb. breasts was steady to instances fully steady. Demand light to fair. Offerings adequate. Domestic trading centered on a heavy volume of plant grade 4-8 lb. breasts 91-91.50 cents delivered August-September, 93 cents delivered November-December. Export trading light. Hearts traded at 26.50 cents delivered export for pet foods and 29-30 cents delivered domestic.

**FRIDAY, AUGUST 30, 2002****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS		R	20.00	80	20.84	496
WINGS FULL-CUT - TOMS	17.50		17.50	52	17.17	156
WINGS, V-TYPE, TOM	28.50		28.50	104	27.71	196
TAILS		R	16.00	104	16.85	288
MECHANICALLY SEPARATED 2/	19.00-20.00		19.50	160	18.70	400
THIGH MEAT - FROZEN	50.50		50.50	80	51.88	982

**THURSDAY AUGUST 29, 2002****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	20.00		20.00	80
WINGS FULL-CUT - TOMS	17.00		17.00	104
WINGS, V-TYPE, TOM	24.00-30.50		26.83	92
TAILS	16.00		16.00	104
MECHANICALLY SEPARATED 2/	18.00		18.00	200
THIGH MEAT - FROZEN	47.00-55.00		49.89	328

**WEDNESDAY, AUGUST 28, 2002****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		T	21.00	156
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM		F	23.50	52
TAILS		T	17.33	184
MECHANICALLY SEPARATED 2/	19.00		19.00	40
THIGH MEAT - FROZEN	55.00		55.00	30

**TUESDAY, AUGUST 27, 2002****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	21.00		21.00	156
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM		F	23.50	52
TAILS	14.50-21.00		17.33	184
MECHANICALLY SEPARATED 2/		F	19.00	40
THIGH MEAT - FROZEN	47.00-50.00		47.83	144

**MONDAY, AUGUST 26, 2002****EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	21.00		21.00	260
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM		F	23.50	52
TAILS				
MECHANICALLY SEPARATED 2/		F	19.00	40
THIGH MEAT - FROZEN	55.00		55.00	400

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.

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